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Contemporary Approaches to Case Conceptualisation & Case Management

Terence Edwards

School Psychologists Association – Western Australia
27th Annual Conference

24th & 25th September 2015
The University Club, University of Western Australia

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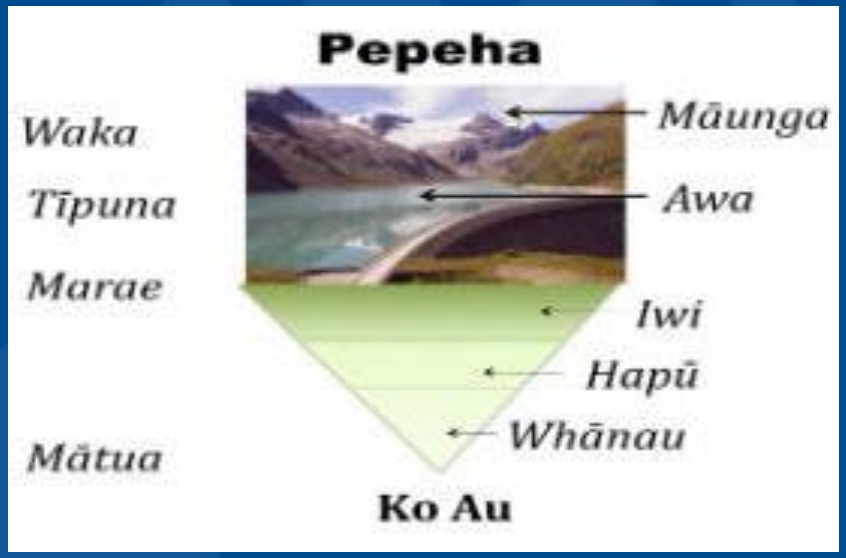
Tēnā *koutou*, tēnā *koutou*, tēnā *tatou* katoa

Greetings, Greetings, Greetings to us all

Ko **Terence** tōku ingoa	- My name
Ko **Boeing 747** te waka	- My waka (canoe)
Ko **Cave Hill** te maunga	- My Mountain
Ko **Farset** te awa	- My River
Ko **Edwards** te whanau	- My whanau (family)
Ko **Cornelia** te rangatira	- My Chief…!
Ko **The House on the Hill** te marae	- My marae (mtg ground/home)



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Who Am I

Mihi mihi

W’hampton | Belfast - London - Belfast – Wanganui – Akl

Massey University, NZ

Waiata

Educational Psychology

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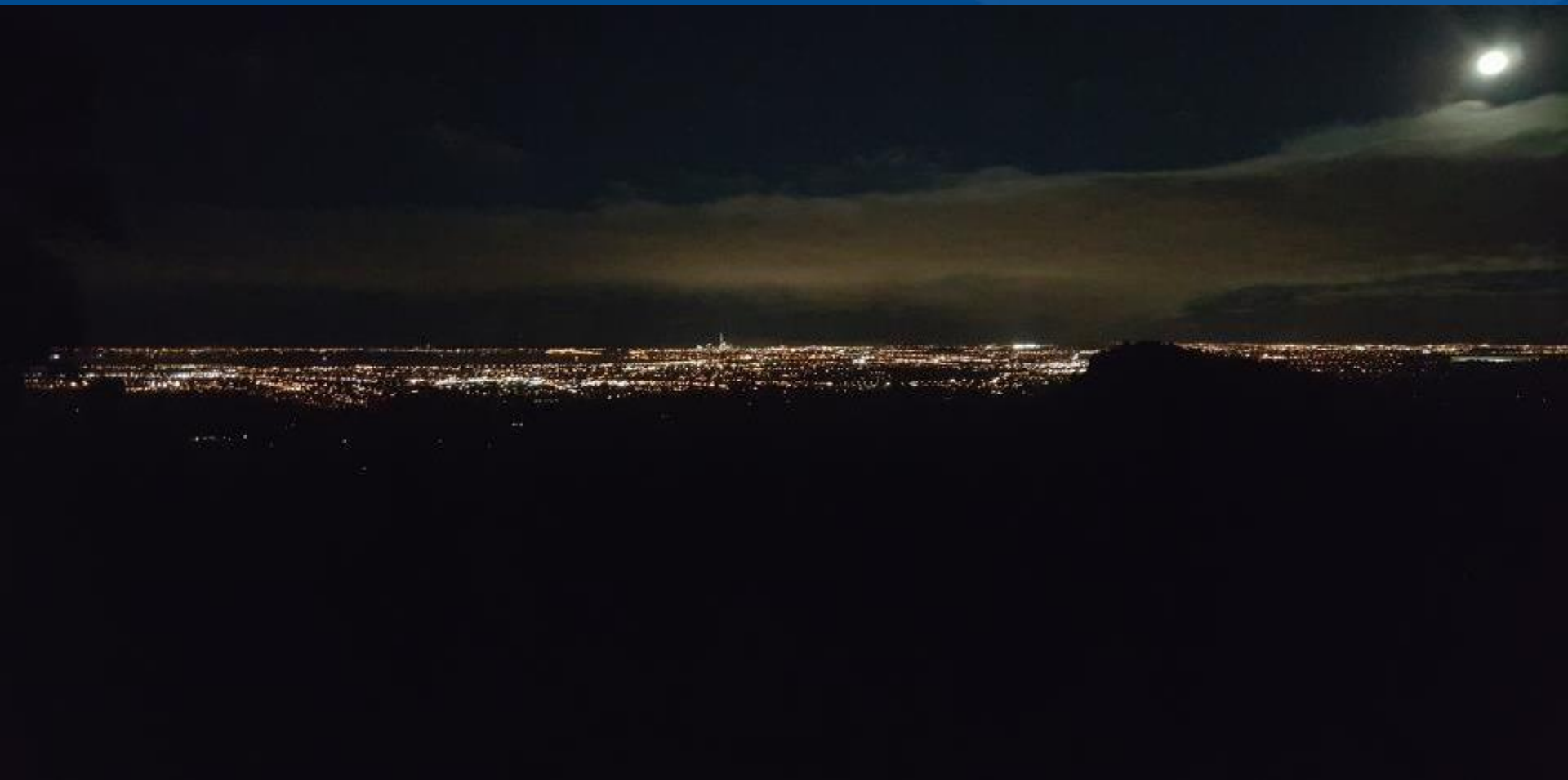
AUCKLAND, NZ



Educational Psychology

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AUCKLAND, NZ

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Massey University Educational Psychology

Jhan Gavala

Judith Ansell

Jeanette Berman

Terence Edwards

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Observation Test 1: **What are we looking for today…?**

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OVERVIEW

- Introductions – who is here…?
  - Practitioners
  - Academics
  - School based vs private practice
  - Government vs non-government
- Frameworks and perspectives for case conceptualisation
- Frameworks and perspectives processes for case management
- Whanaungatanga

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Intended learning outcomes

What you <u>will</u> get from this workshop

- A **conceptual framework** to guide practice and respond to and *process* (problem) situations
- A **problem solving framework** grounded in data based decision making, reason, and pragmatism
- A **framework to complement** your existing tools, processes, and case management kit (de Jong, 2006)
- A framework and perspective that is **focused on reducing the complexity** of a situation to create a way forward

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What you won't get from this workshop

- The specific answers to specific problem situations
- A recipe list of strategies or interventions
- A replacement set of tools for the Case Management Kit (de Jong, 2006)!

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Intended learning outcomes

Some more things YOU WILL get from this workshop

- A **practical** perspective
- A perspective grounded in ~~best~~ **effective** practice
- Opportunity to **share** and **contribute** your knowledge and expertise
- Q&A as we go…**challenge to ideas and thinking** are encouraged (within reason given time constraints!)
- Content is **consistent** with the principles, aims, and strategies outlined by **de Jong (2006)**

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De Jong (2006)

1.4.1 Principles

Effective school case management practice should be guided by 5 principles:

1. The promotion of the student's health & well-being
2. An individualised process
3. Maintenance of legal & human rights, privacy and confidentiality
4. Non-discriminatory & culturally appropriate practice
5. An efficient & purposeful management process.

1.4.3 Aims - Seven core aims

1. To enable students…to best of ability/circumstances
2. …engaging students in meaningful learning
3. To develop…and evaluate a plan of action
4. …seamless service…coordination…collaboration
5. To ensure…access to…service providers
6. …involve and empower the student(s) and…parents/caregivers in decision-making
7. To assist teachers and school staff in their work with students who have support needs

1.4.4.2 Strategies - Seven interconnected strategies:

1. Case Identification
2. Referral
3. **Assessment**: Endeavouring to understand the student's perspective, and identifying and assessing the student's needs)
4. **Planning**: A collaborative and dynamic process of establishing a coordinated action plan with key stakeholders
5. **Implementation**: Executing, coordinating, and monitoring the action plan
6. Transition or Closure or Completion: Developing a transition plan to move to minimal or no case management
7. **Evaluation**: …effectiveness of the…action plan.

RTI & PBIS				
Tier 3	Intensive	Individual	Tertiary	Approx. 5%
Tier 2	Targeted	Classroom	Secondary	Approx. 15%
Tier 1	Universal	School-wide	Primary	Approx. 80%

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Setting the Scene

- The work of school and educational psychologists is:

- *wide and varied*
- focused on promoting learning & behaviour
- focused on promoting social and emotional development
- focused on mental health
- focused on systems level support
- focused on building capability (of teachers and systems)
- *Other…what else…?*

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Educational psychology in NZ

- Ministry of Education vs private
- Behaviour focussed (Behaviour Services) / PB4L
- 1% school population
- Highest level of complex situations and issues
- Learning is not a focus for referral to psychology services
- RTLB / specialist teachers have learning focus

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Contextual imperatives

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Massey University Educational Psychology Internship
- oldest in NZ – but not that old itself

Change of staff on the programme – the taught come back to teach

Opportunities for review, renewal & reframing for School Psychology

Some conceptual models inform content

BUT

No overarching model to pull and hold it all together

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Contextual imperatives

PRIORITY NEED – for a conceptual framework or model to guide and inform learning, development and application of knowledge and skills

A conceptual framework for our purposes is defined as a system of ideas and objectives that identify, guide, and inform a coherent and consistent set of behaviours and standards

Contextual imperatives

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NEW ZEALAND PSYCHOLOGISTS BOARD

New Zeala

Website: v

Core Competencies

For the Practice of Psychol
in New Zealand

Reprint
as at 27 August 2013

Health Practitioners Competence Assurance Act 2003

Public Act 2003 No 48
Date of assent 18 September 2003
Commencement see section 2

1 Title

Contents

Part 1 — Page 12
Preliminary and key provisions
Preliminary provisions
2 Commencement 12
3 Purpose of Act 13
4 Outline 13
5 Interpretation 16
6 Act binds the Crown 19
Key provisions
7 Unqualified person must not claim to be health practitioner 19
8 Health practitioners must not practise outside scope of practice 20

Note
Changes authorised by subpart 2 of Part 2 of the Legislation Act 2012 have been made in this reprint.
Note 4 at the end of this reprint provides a list of the amendments incorporated.
This Act is administered by the Ministry of Health.

1

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Contextual imperatives

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PART 1: Core Competencies for Psychologists Practising within the "Psychologist" Scope of Practice

- Introduction 3
- Discipline, Knowledge, Scholarship, and Research 4
- Diversity, Culture, and Treaty of Waitangi/Te Tiriti o Waitangi 5
- Professional, Legal, and Ethical Practice 6
- Framing, Measuring, and Planning 7
- Intervention and Service Implementation 8
- Communication 9
- Professional and Community Relations, Consultation, Collaboration 10
- Reflective Practice 11
- Supervision 12

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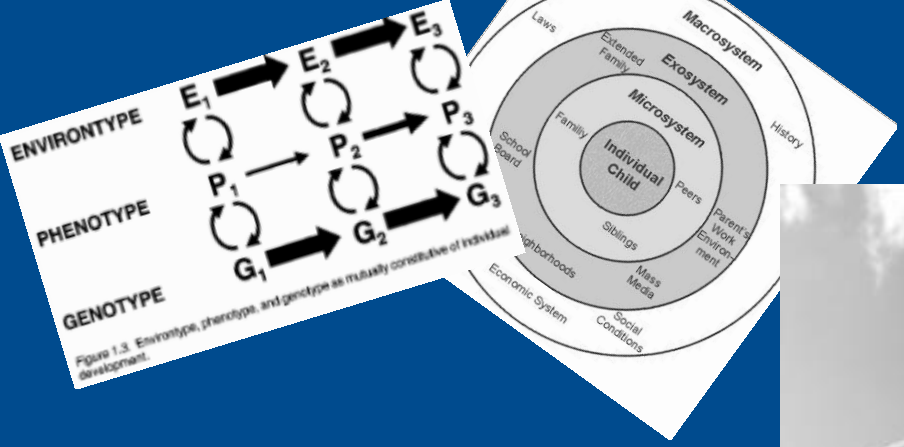
QUESTION:

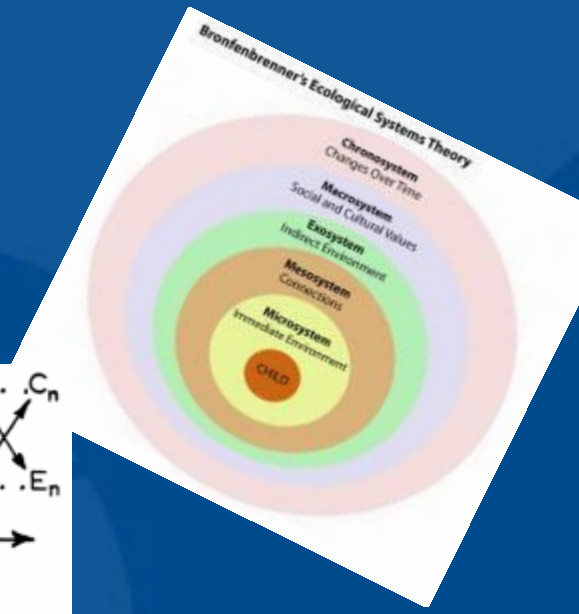
What makes contemporary educational and school psychology distinct from other psychologies in its interpretation and application?

ANSWER: Hmmm, that is difficult to say…there are so many elements, there are so many pieces!



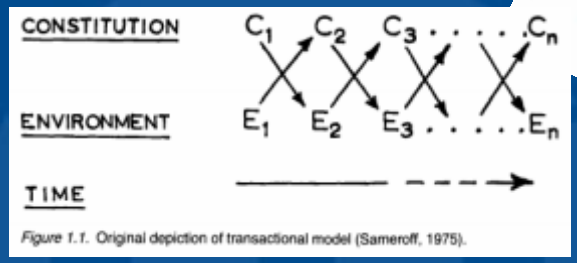
Models, Frameworks, Perspectives

Genetics vs environment / Nature vs Nurture



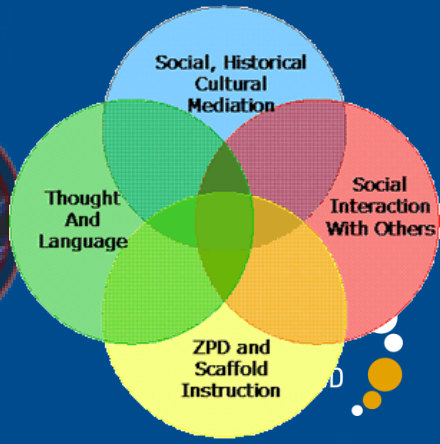
Bronfenbrenner (1979): Ecological model

Lewin (1936): B = f(P, E)



Sameroff & Chandler (1975): Transactional Model of Development

Vygotsky (1934): Socio-Cultural Theory



Which leg is more important for walking?

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Kurt Lewin (1936)

$$B = f(P,E)$$

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Educational Psychology is in PIECES

- **Jan 2013** – identified the need/opportunity for a framework to guide training and practice
- **Sept 2013** – there are so many **PIECES** and that was the answer!

Positive, Inclusive, Ecological, Collab'ative, Ethical, Scientific

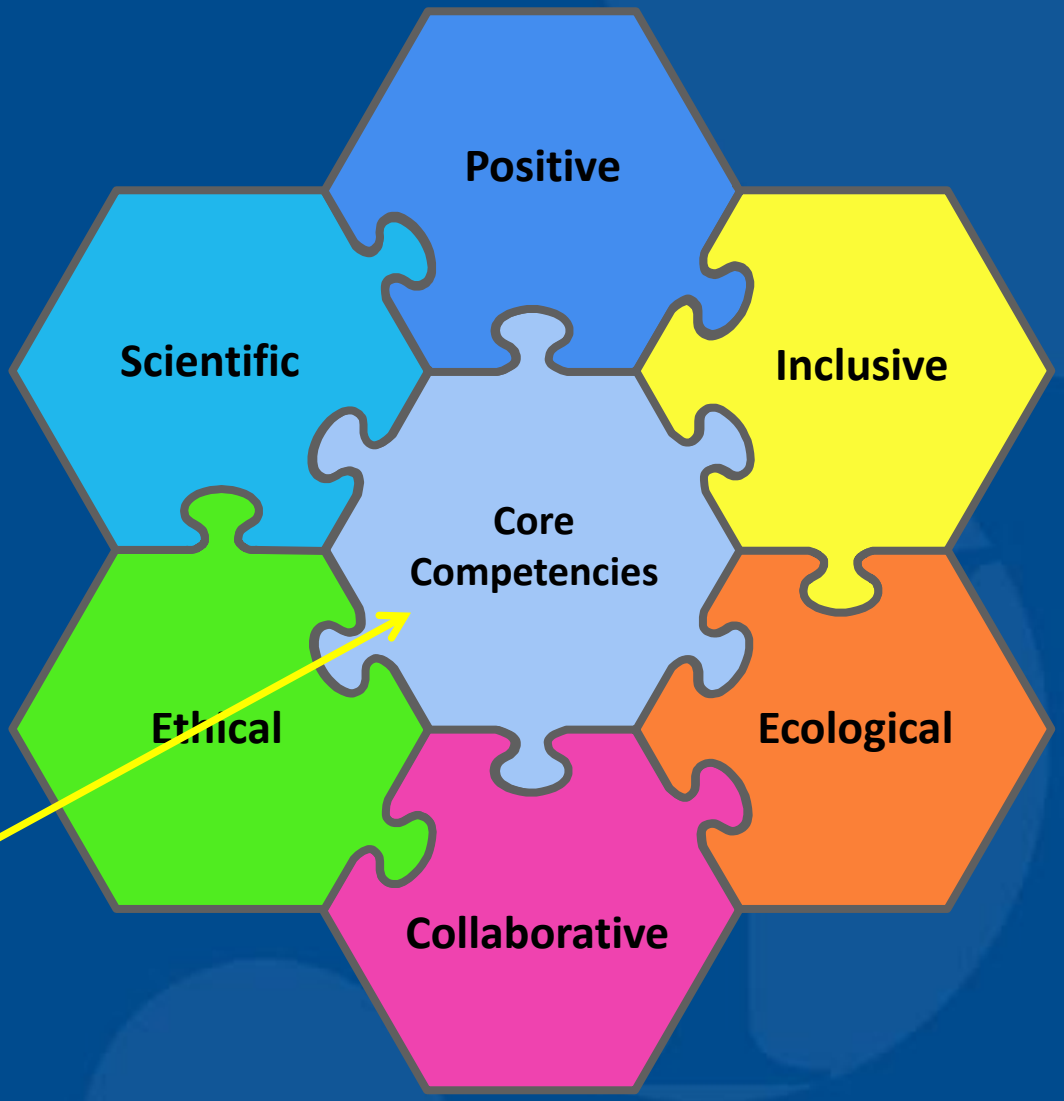
- **In 6 groups of X discuss and summarise what these concepts mean**

- Note down your **top five** defining characteristics for each concept

- Group responses & feedback (**with next few slides**)

PIECES Model

Edwards, 2014



The heart of the matter

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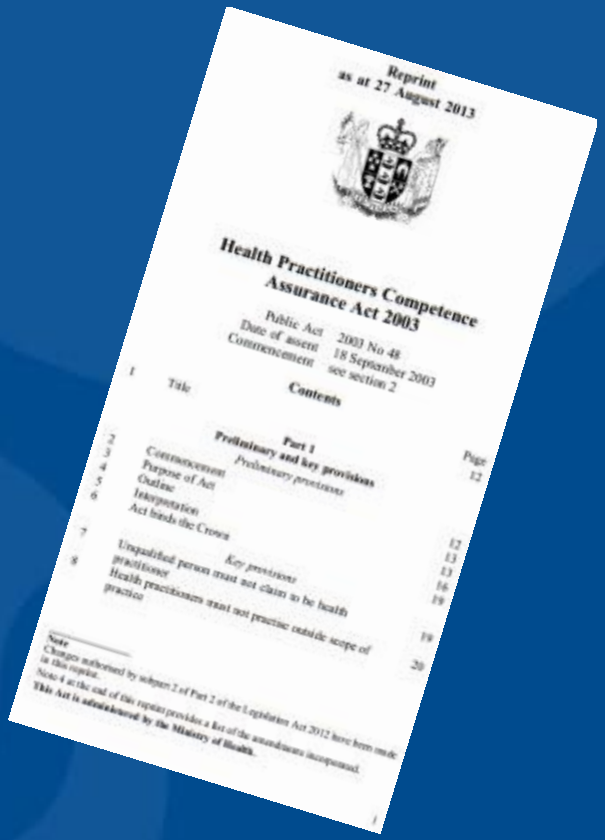
Board prescribed

Inform and guide professional actions

CCs are at the centre of professional practice



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1. Discipline, Knowledge…
2. Diversity, Culture…
3. Professional, Legal, & Ethical…
4. Framing, Measuring, & Planning
5. Intervention…Implementation
6. Communication
7. Professional & Community Relations, Consultation, collaboration
8. Reflective Practice
9. Supervision

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Top 5 defining characteristics

Share your thoughts from group discussion on what this concept means

Problems need to be acknowledge but not dwelled upon

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Prevention, promotion, maintainance

Strengths based

- Assessment
- Framing
- Interpretation

Respectful, more dignified and empathetic

Promote an emphasis on leveraging from **strengths**

Create hope & optimism

Can do -> will do -> did do

Expectation –> Intention –> Action

All problems have solutions

No problem is insurmountable

Everything will be alright in the end…if it is not alright, then it is not yet the end

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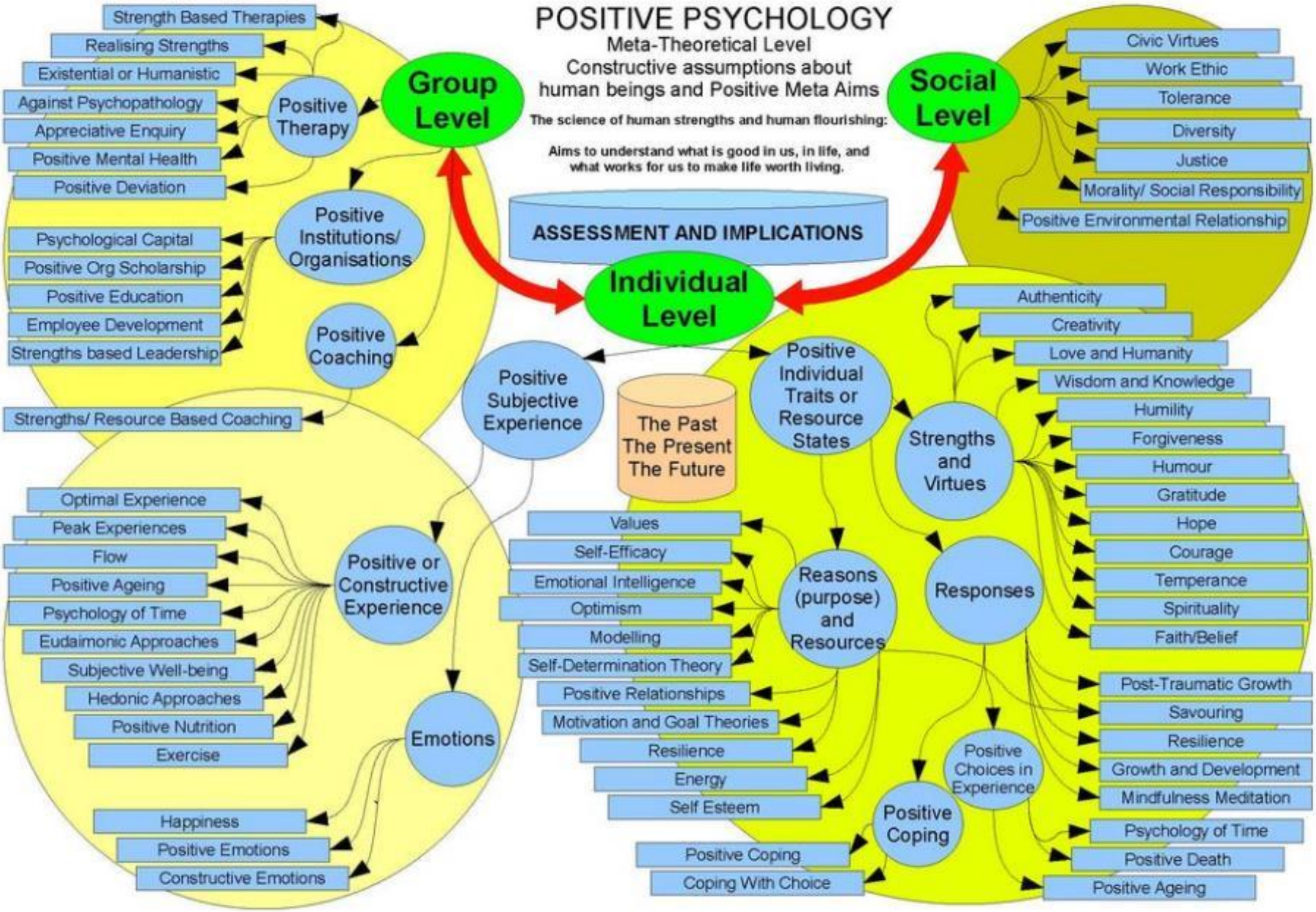

Mind map of positive psychology (Smith, C., 2008)

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Top 5 defining characteristics

Inclusive

Share your thoughts from group discussion on what this concept means

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Promote and support equal and equitable access to education services and supports

Actively ensure the **voice** of core participants is heard

Listen to, include, and incorporate participant worldviews, values and perspectives

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Share your thoughts from group discussion on what this concept means

Top 5 defining characteristics

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Genuine attempts to seek and include multiple perspectives

Identify the links and connections between multiple contexts and relationships

Reciprocal nature of factors and variables

Ecological and systemic drives thinking and analysis

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Top 5 defining characteristics

Share your thoughts from group discussion on what this concept means

Collaborative

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Partnership

Working **with** not on people

Identify & determine priorities

Support & empower

Identify targeted, relevant and meaningful interventions

Whanaungatanga: rel'ships, connection, obligation, reciprocal

far – now – nah – tang – a

Whakawhanaungatanga – the process of establishing relationships

(fak – a – far – now – nah – tang – a)

Student voice

Parent voice

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Share your thoughts from group discussion on what this concept means

Top 5 defining characteristics

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A man without ethics is a wild beast let loose upon the world

Albert Camus

Honesty

In

Professionalism

Everything

Dignified

We

Trust

Do

Professional Integrity

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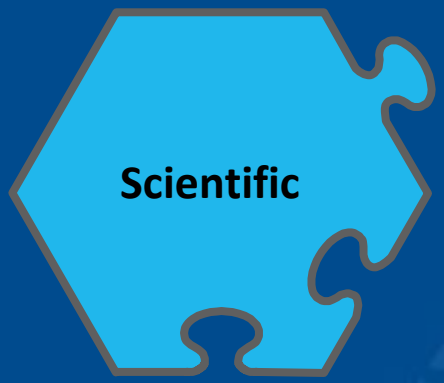

Share your thoughts from group discussion on what this concept means

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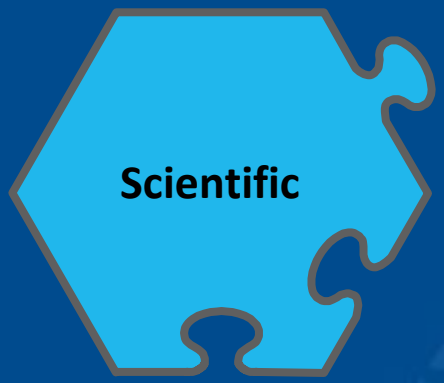
Data driven assessment and analysis

Evidence from many sources

Data & analysis linked and informed interventions



Data / logic / reason

Problem Analysis a process for case management

Compassion without enlightenment is little more than well-intentioned bumbling; enlightenment without compassion is callousness masquerading as scientific objectivity *(Senders, 1978)*

This quote illustrates the connecting of the two ends of the framework, creating a cyclical whole

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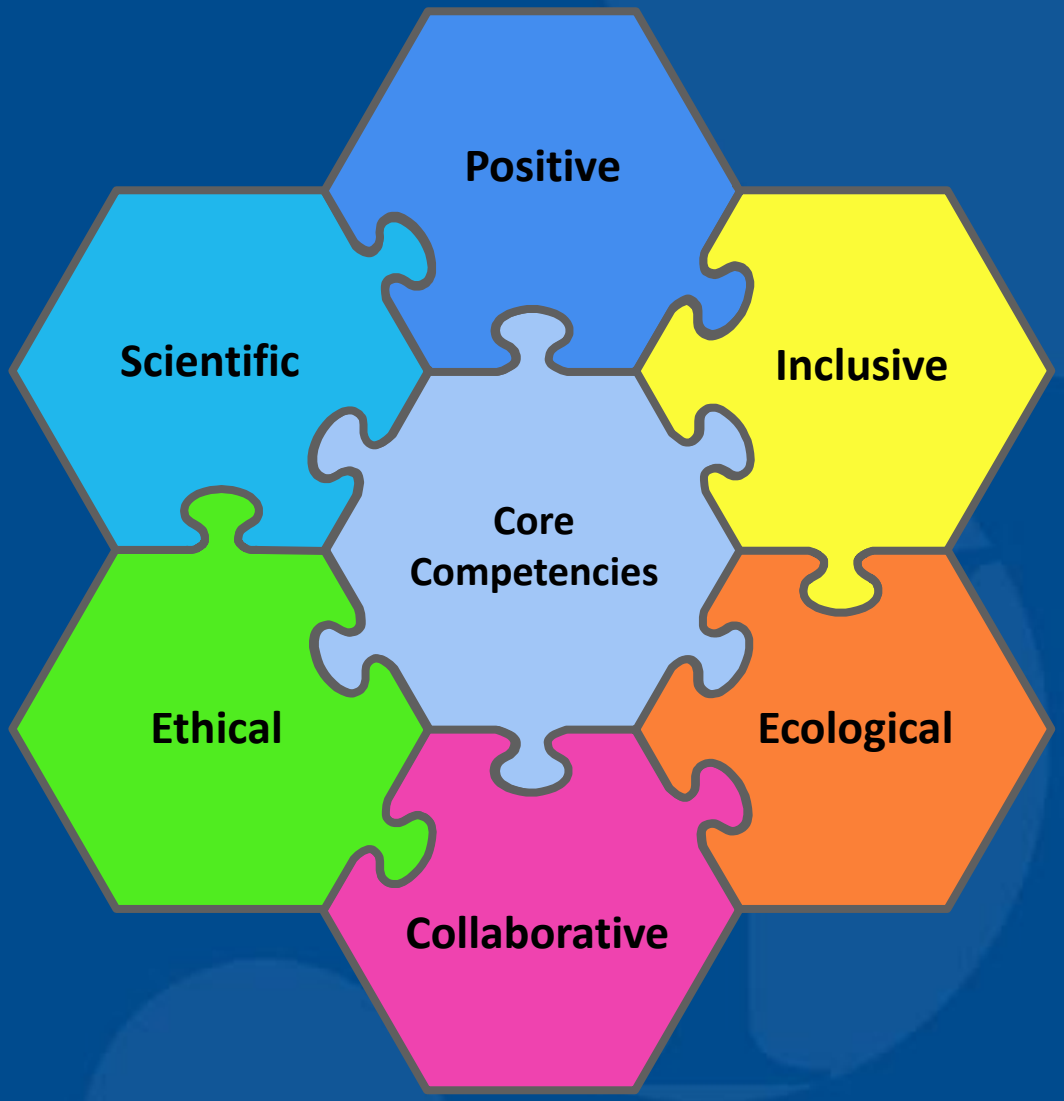
PIECES Model

Edwards, 2014



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LUNCH

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After carefully conditioning a flea to jump out of a box following the presentation of a loud noise, the researcher removed the first pair of legs to see what effect this had. Observing that the flea was still able to perform his task, the scientist removed the second pair of legs. Once again noting no difference in performance, the researcher removed the final pair of legs and found that the jumping behavior no longer occurred. Thus, the investigator wrote in his notebook, "When all the legs of a flea have been removed, it will no longer be able to hear."[1]

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WAIATA - Stan Walker - Aotearoa

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- HANDOUTS:
- SLIDES
- SITUATIONAL ANALYSIS

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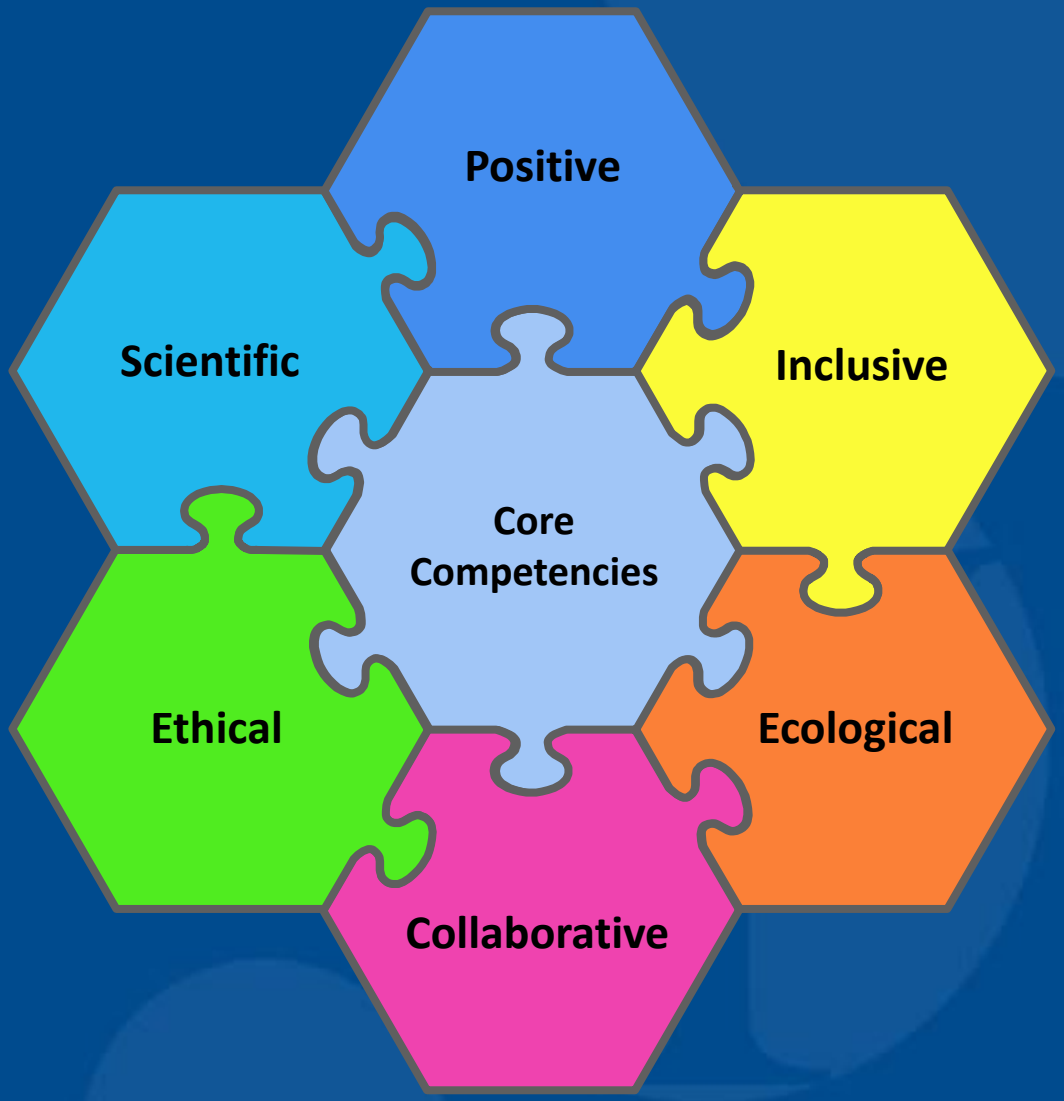
PIECES Model

Edwards, 2014



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Scientific

Problem Analysis a process for case management

Problem Analysis:

Robinson (1987)

Monsen (1999)

Finding the way forward in complex **problems** and **situations**

Situational Analysis

Annan (2005)

Hand out (1 pager)

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Scientific

Problem Analysis
Vivian Robinson (1987)

"The job of the psychologist is not to reflect back to clients the ill-structured and complex nature of their problems. It is to **reduce their complexity** by developing a model which **transforms** the details of the **problem into a conceptual map** which reveals the problem's key dimensions and their inter-relationships.

How can psychologists complete this task?"

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Scientific

Problem Analysis
Vivian Robinson (1987)

"Such problems can be understood by developing a series of **hypotheses** about the nature and causes of the problem. These hypotheses in turn indicate areas worthy of further exploration, the types of questions which are likely to produce evidence relevant to the hypotheses, and the criteria against which to evaluate the information obtained."

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Problem Solving Models

(The) Terence's **I**ncredibly **S**imple **A**lgorithm of **P**roblem **S**olving! (TISAPS)

A **B**

A simple but effective tool for problem solving and planning and implementing change

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Problem Analysis / Situational Analysis

PROCESS

- Referral
- Negotiation
- Background
- Assessment Plan
- Dimensions
- Analysis
- Prioritisation
- **Intervention**

EVALUATION

- Implementation Fidelity Check
- Outcomes / Data
- Reflection and Evaluation
- Closure / new cycle

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School Psychology International (2005), Vol. 26(2)

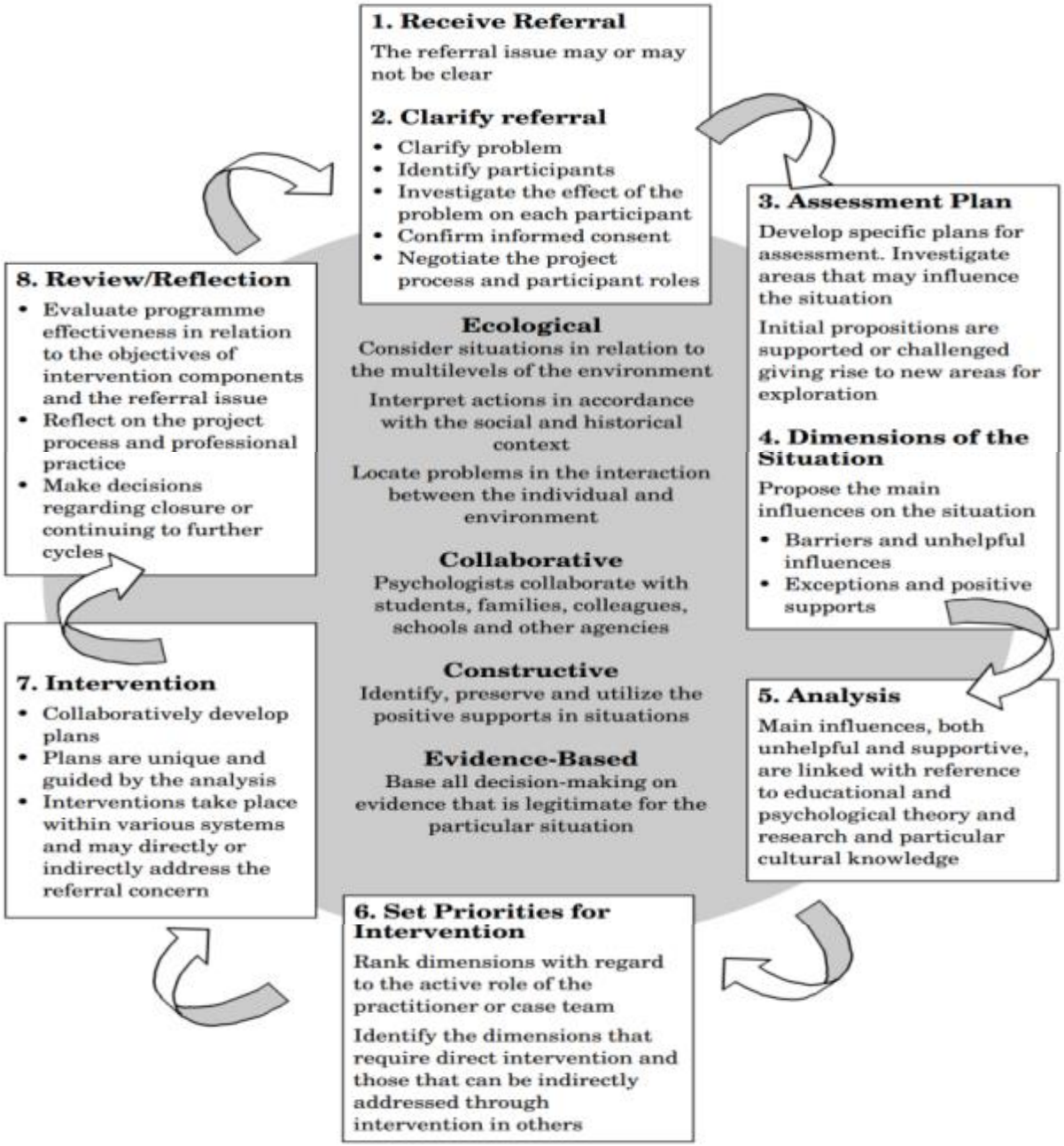

Figure 1 *Situational analysis*

Annan, 2005

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Systematic Problem Analysis

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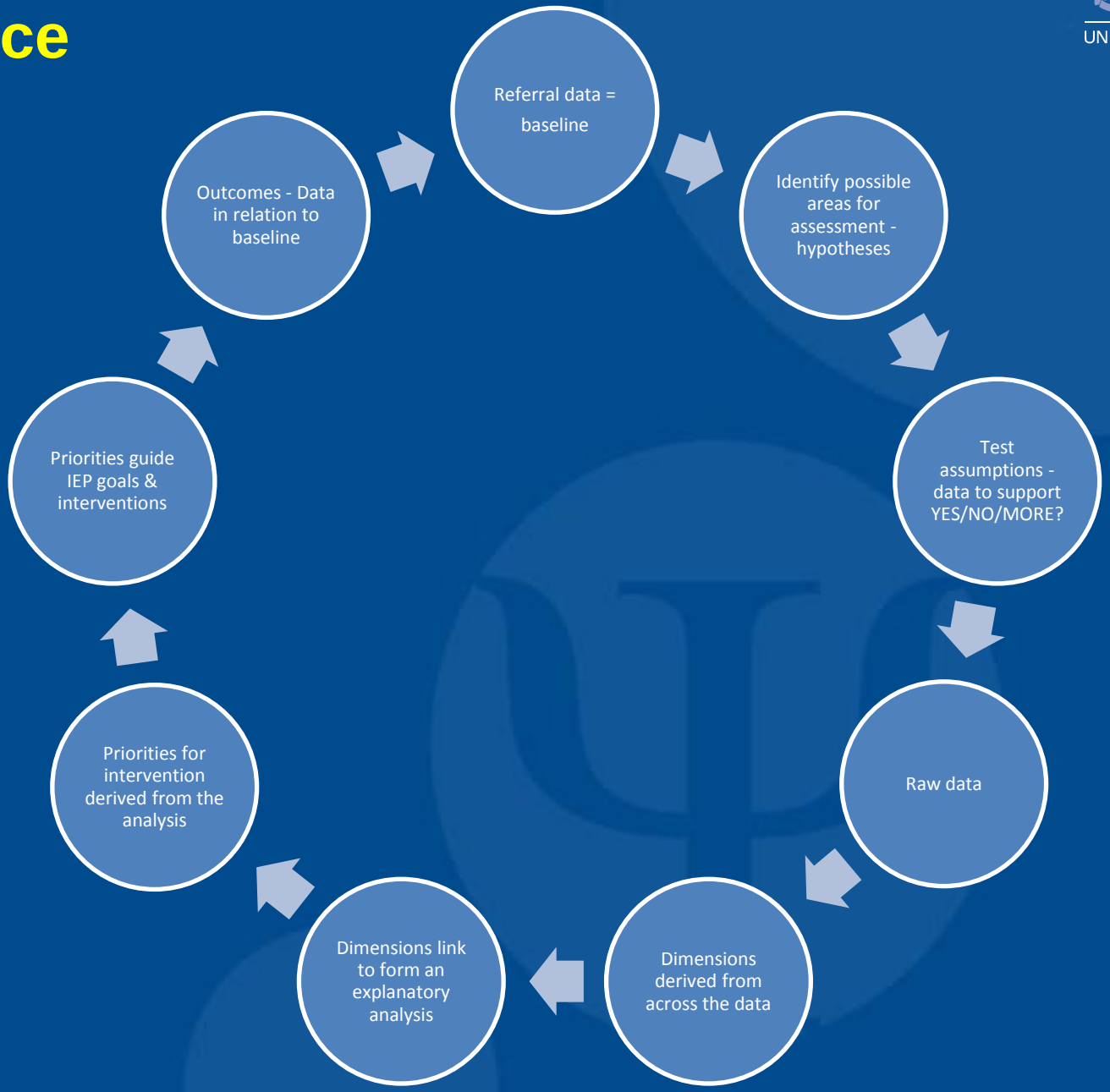
Data-processing Sequence



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Ecological

- Genuine attempts to seek and include multiple perspectives
- Seek to identify the links and connections between multiple contexts and relationships
- Reciprocal nature of factors and variables
- Ecological and systemic mindset leads thinking

Collaborative

- Work with and include other people
- Key people involved share and contribute to:
  - Determining the focus of the work
  - Providing information that supports authentic assessment
  - Co-constructing targeted and relevant interventions
  - Implementing interventions
  - Reviewing and revising (as needed)

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Summary key considerations

Problem Analysis /
Situational Analysis

Step 1: Referral Received and Negotiated

- Contact key stakeholders / referrer – agree meeting time
- Include student perspective at meeting (as appropriate)
- Include parent perspective at meeting
- Clarify referral issues and concerns (consensus needed)
- Establish expectations of role for ***assessment*** **ONLY** (why?)
- Establish timeframes for actions/activities
- Set date for feedback/planning meeting

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Summary key considerations

Problem Analysis /
Situational Analysis

Step 1: Referral Received and Negotiated

- Determine cultural, legal, ethical, and practical considerations
- Check own assumptions for bias
- Explore hypotheses of key participants
- Formulate initial hypotheses
- Identify positive aspects of the situation

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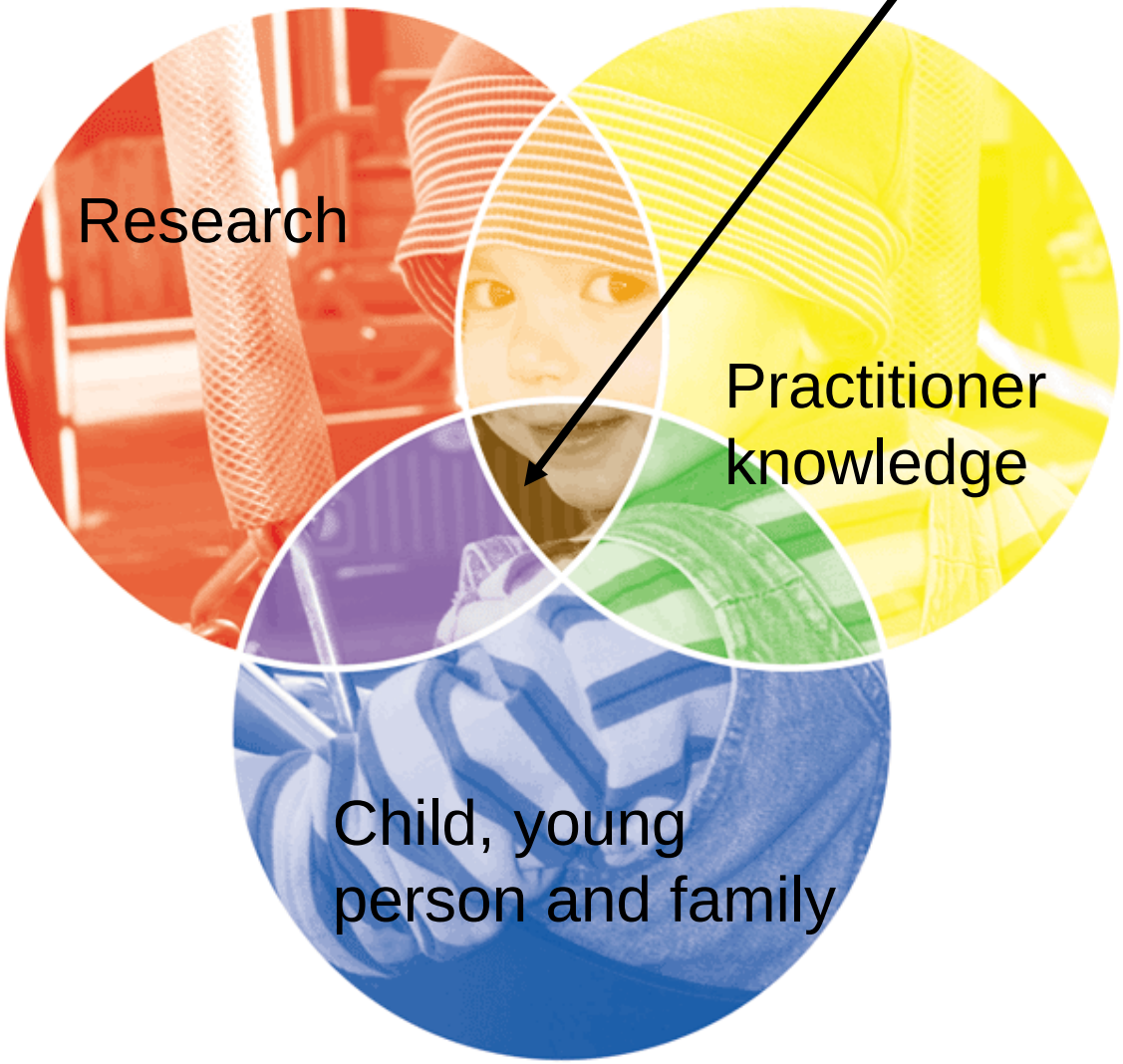
Problem Analysis /
Situational Analysis

Step 2: Planning and Assessment

- Keep family informed of steps and progress (negotiate update frequency) - Principle of no surprises applies
- Assessment Plan (what, why, how)
- Plan and arrange interviews, meetings, observations, formal assessment times, access to records
- Coordinate and align the negotiated activities of others (who will do what when)
- Test each hypothesis / seek disconfirming evidence

Evidence-Based Practice

What constitutes evidence?



- Research.
- The 'expert' model
  - Medical model.
- Practitioners Skills and experiences.
- Trial and error sometimes adhoc.
- Child, young person, whanau and families. The individual and the collective voice.
- Information needs to be mediated. Experience counts. Patterns identified.
- Evidence-Based Practice.

Bourke et al, 2003

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Assessment

Is a **collaborative** process of **understanding** the needs, issues, challenges and strengths for the child or young person and their family

Aims to identify possible solutions, determine what needs to be **achieved** and what **progress and success** might look like

Constitutes both the initial process of the work cycle and is an **on-going process** of measuring and monitoring change, improvement and progress

Enables people to gain a **fresh perspective** or **insight** into their situation and offers **hope**

When done well what does this look like for:

the child or young person?

their family and/or caregivers?

the teacher/school?

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Common Assessment Framework

Attachment
Peer Relationships
Health
Identity
Behaviour
Learning and Achieving
Education
What are my hopes, dreams and wishes?
Child or Young Person wellbeing
Safety
Belonging
Wellbeing
Parenting Capacity
Parenting skill & knowledge
Safety & basic care needs
Factors Impacting on safe parenting
Relationship with the child or young person
Guidance and Supervision
Family/whanau and Environmental factors
Networks of Support
(social relationships, community and cultural support and connections)
Family/Whanau/Hapu/Iwi
(relationships, history and functioning)i
Resources available
(financial, employment, housing)

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Summary key considerations

Problem Analysis / Situational Analysis

Step 2: Planning and Assessment

- Perspectives check and the Golden Rule: If I were the *<parent/student/teacher>* what would I want me to be doing
- Check data integrity (validity, reliability)
- **How much data is enough**

- Triangulate data
- Identify tentative dimensions – test and explore
- All dimensions to include reference to the positives

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Step 2: Dimensions

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Dimensions are identified by **looking across the data**

Referral: Johnny / disruptive & aggressive behaviour in class. A year 2 teacher.

- **Data point 1:** Observational, frequency, and duration data shows disruptive and off task behaviour occurs mostly in the period before lunch.

- **Data point 2**: Teacher reports Johnny is frequently acting out and distracting other children…this happens most when there are academic tasks in the class schedule. Increased frequency of problem behaviour correlates with the nature of the task(s). E.g. Johnny is on task more when there is a hands on session and off task more when there is an academic loading

- **Data point 3**: Interview data and records review highlight that Johnny did not display this problem behaviour last year when in Mrs Smith class. Mrs Smith has been teaching for about 10 years.

Data point 4: Johnny says he likes school but that the classes are boring and he does not like his teacher because the teacher is "always on my case…"

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Step 2: Dimensions

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Dimensions are identified by **looking across the data**

Referral: Johnny / disruptive & aggressive behaviour in class. A year 2 teacher.

If we focus only on each data point our capacity for change is limited

	Possible Dimension Name and Focus
Data point 1:	Off/On task Behaviour
Data point 2:	Academic skills
Data point 3:	Program Mismatch
Data point 4:	Teacher–Student Relationship
Data 1 – 4:	**Support for Academic Success**

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- The example above reflects several key principles of our approach to assessment and intervention:
  - An ecological approach recognises the reciprocity between people and systems in their environment.
  - Assessment and analysis considers the interconnections and relationships between factors
  - Maintaining a positive and solution focused approach and perspective
  - Minimally intrusive assessment (and intervention)
  - Data driven and informed conceptualisations of a given situation.....

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Step 2: Dimensions – Framing and Reporting

Activity / Hand out: Dimensions Identification & Framing Task

- There are many ways of interpreting the data
- There are many ways of framing the data
- Some ways are more helpful than others

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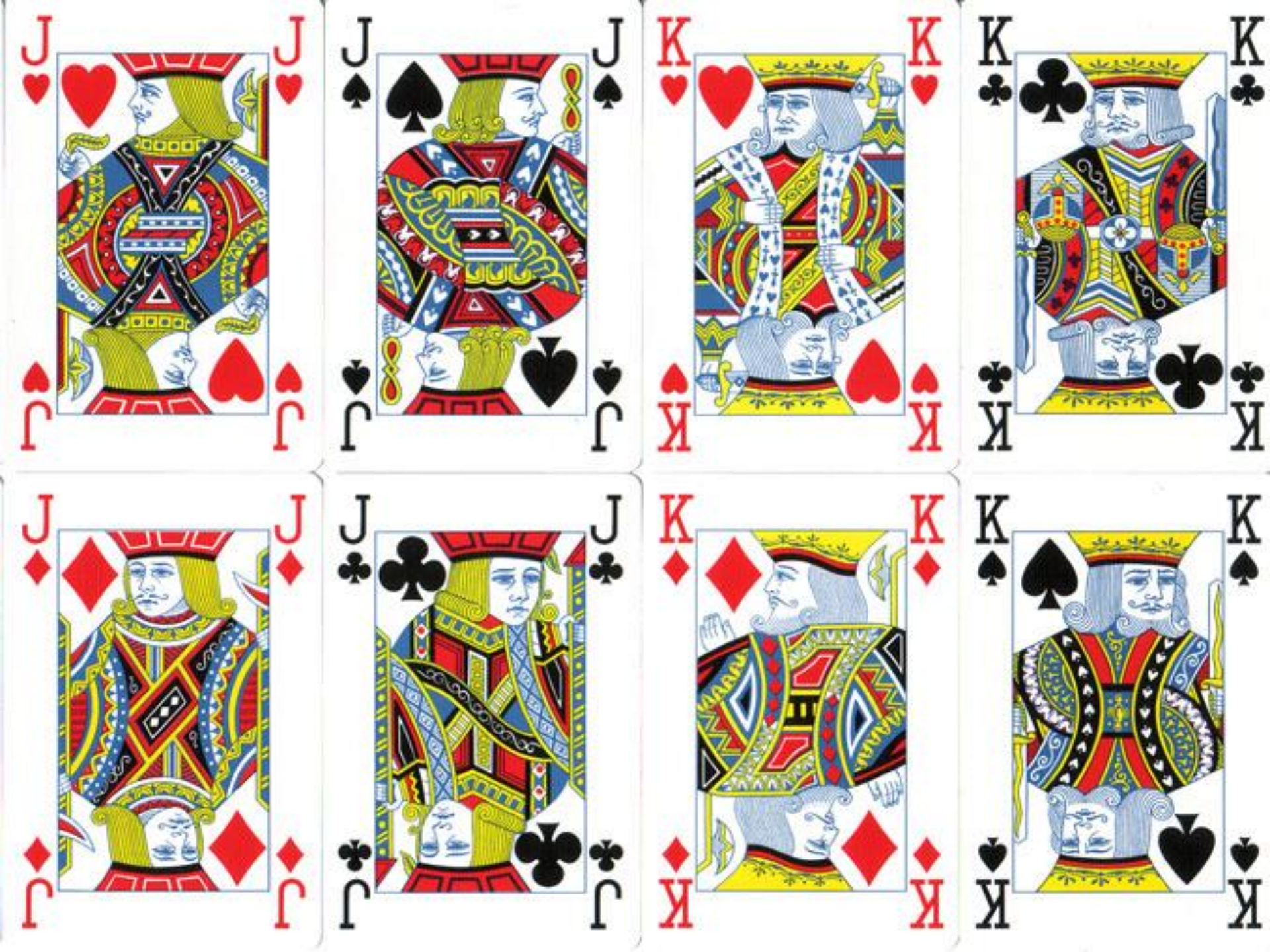
Observation Test 2

You have **three** minutes to carefully examine the faces of each of the cards before a test is given



Having observed the cards...

1. How many Kings are holding an Axe?
2. How many Jacks have a mainly red and black hat?
3. How many Kings are looking to **your** left?
4. How many diamonds are there in the centre of the Jack of Diamonds chest?
5. How many Kings wear a moustache?
6. How many Queens have dimples in their cheeks?
7. How many Jacks are facing to the right?
8. How many Kings are holding a sword upright?
9. How many kings have both hands showing?
10. How many one eyed Jacks are there?

Having observed the cards...

1. How many Kings are holding an Axe? (1)
2. How many Jacks have a mainly red and black hat? (2)
3. How many Kings are looking to **your** left? (3)
4. How many diamonds are there in the centre of the Jack of Diamonds chest? (3)
5. How many Kings wear a moustache? (3)
6. How many Queens have dimples in their cheeks? (0!)
7. How many Jacks are facing to the right? (2)
8. How many Kings are holding a sword upright? (2)
9. How many kings have both hands showing? (1)
10. How many one eyed Jacks are there? (2)

Discussion Points

- How many times do you think you have looked at face cards in your lifetime?
- How would you define the difference between seeing and really observing?
- What made this *test* so difficult?
- What could have been done to make you each more successful in this *test*?

Moral of the exercise!

We can see something many times—to the point of total familiarity, perhaps—and still not learn some fairly basic things about the subject/object we are looking at.

It is truly amazing how we can LOOK AT something and still not really SEE it.

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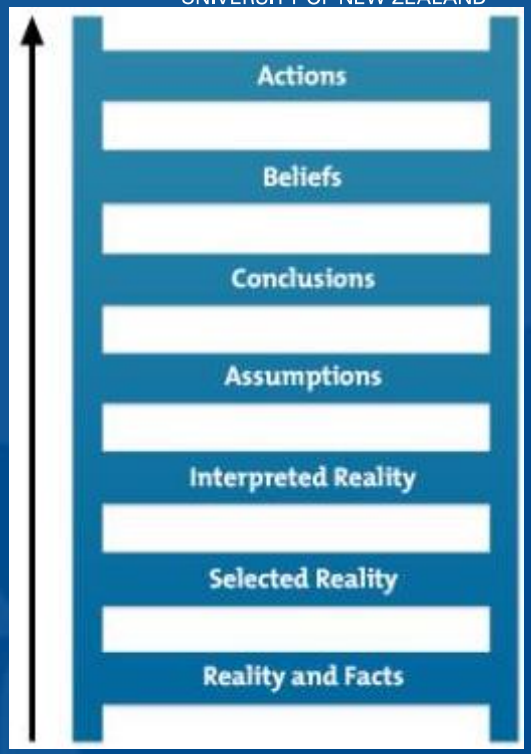
Scientific

Analysis

(refer to p. 4 Report Template)



Conclusions and actions **must** be data driven and informed, and be based on sound logic and reasoning

Analysis **links** case data **to the literature** and includes analytical reasoning explaining what is happening relative to the referral / identified issue(s).

Data / logic / reason

Reduced complexity

A pathway forward

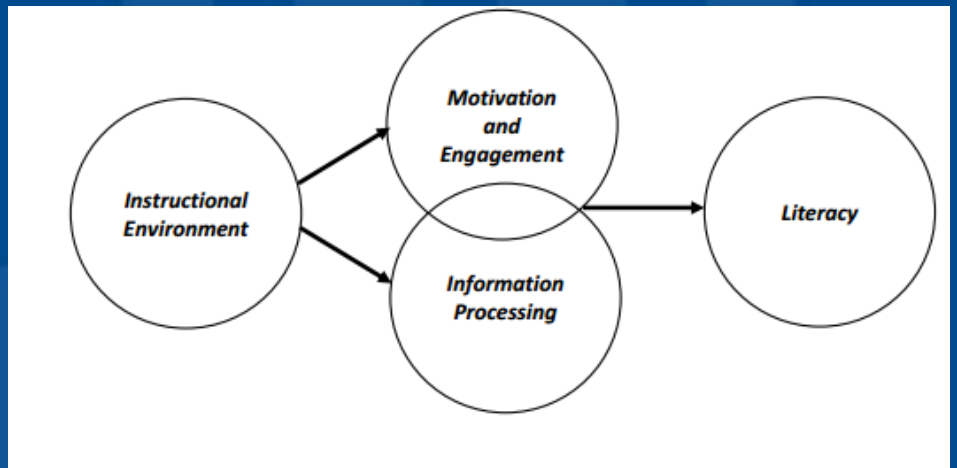


Figure 1. Analysis Summary Diagram

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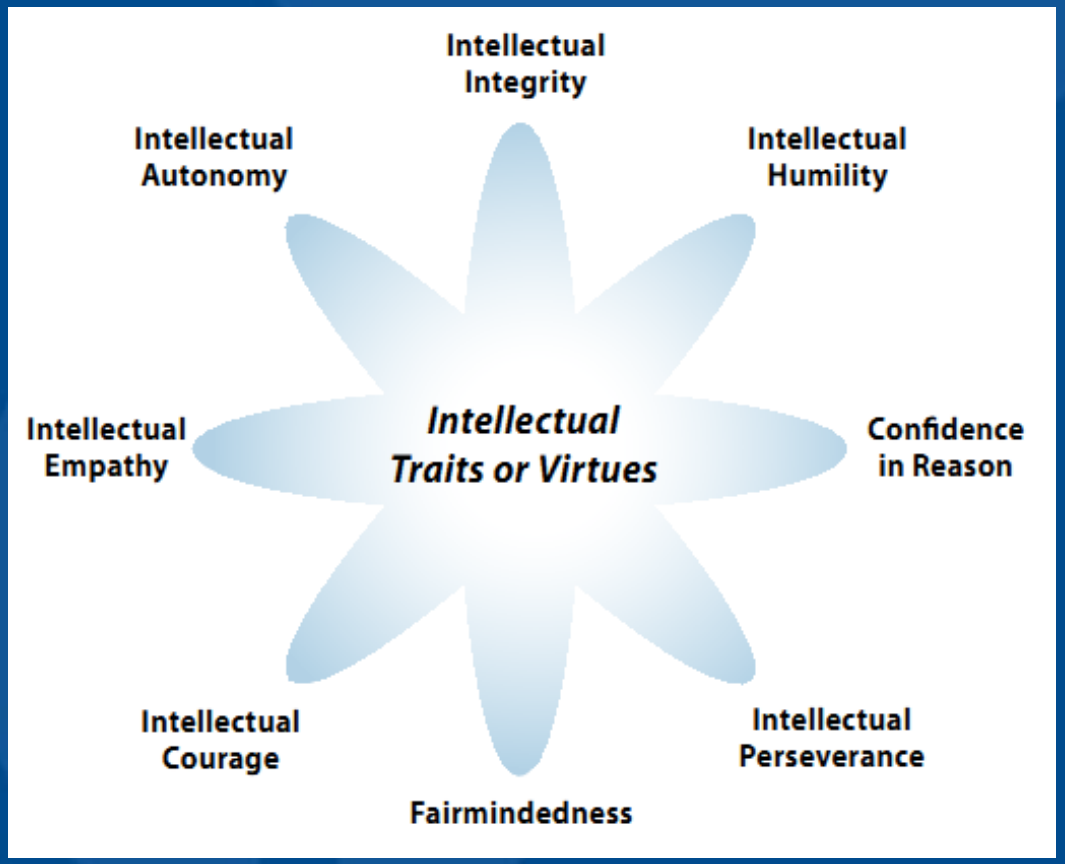
PRIORITISATION

- What is important to whom?
- Whose perspective should take precedence?
  - School
  - Family
  - Student
  - Yours?
- Social and ecological validity
- Successful small steps in the right direction are better than…unsuccessful big steps
- The best plan in the world is no good if it is not implemented



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Interventions

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Capuchin monkeys

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- Please complete the workshop feedback sheet
- Tear off the last page of the handout and leave it on the front desk next to the computer
- Your feedback is greatly appreciated and WILL be taken on board!

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- Dimension / Title
- Hypothesis
- Objective
- Rationale
- Programme
- Responsibilities
- Resources
- Outcome Measures
- Outcomes
  - Implementation fidelity check
  - Intervention Data
- Reflection / Evaluation

INTERVENTION PLANS

SMART

Coherent

Consistent

Data driven/informed

Logical

Reasonable

Doable

Measurable

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A helpful framework assists psychologists to:

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- Process data systematically
- Manage large amounts of information
- Gather data efficiently - Collect relevant data
- Ensure decisions are based on evidence
- Integrate data from various sources
- Work collaboratively

- Add new insights

- Develop appropriate interventions in the contexts in which they are implemented
- Build interventions on positive supports
- Check that interventions are minimally intrusive

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Case Study Process Review

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1. Clarification	What is the problem? Who are the people involved? Why is the problem a problem to each person? Have you got informed consent? What is the process for the project? What are the roles of participants? By this time you will have information about the background to the situation? (Included in report).

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2. Assessment Plan	What areas will be explored? What methods will be used? Are the methods culturally relevant? Developmentally appropriate? From whom, and by whom, will the data be collected?
3. Assessment	Collect data and ask: How do participants describe the problem? (Baseline) How will participants know if a solution has been created? (Outcome measure) Are any additional assessments required in the light of data collected so far? What are the strongly influencing factors?

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4. Analysis	What is the story? Main influences, unhelpful and supportive, are considered alongside one another with reference to psychological theory and research and cultural knowledge
5. Priorities	What broad qualities, implied in the analysis, will a helpful intervention have? What aspects of the intervention will take priority?
6. Intervention	Who will construct the intervention? What is the purpose/aim of the intervention? How will we know if the intervention is successful? What activities will form the intervention? For what reason are components included? Who will implement the intervention? How will we know how the intervention is progressing?

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7. Review	Was the process successful? To what extent was a new solution created? What professional practice supported the process? What professional activities may have enhanced the process? Maintenance and generalisation - Will the participants maintain the solution with their existing supports?

Problem Analysis: A framework for EBP

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- assessment is carried out to gain data and information in order to identify and investigate dimensions
- analysis is informed by research and knowledge from allied fields/disciplines
- the analysis is grounded in sound theory that is regarded by the profession for its ability to generate hypotheses, make decisions and explain outcomes
- outcomes are measured through systematic collection and analysis of a range of qualitative and quantitative data

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Problem Analysis: A framework for EBP

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- Different systems and forms of knowledge can be presented as evidence (e.g. taha Maori, tikanga)
- Individual stories, perspectives and ways of knowing can be studied
- Information and data is gathered through agreement and shared understanding of the intentions
- Collaborative consultation serves as a reliability and validity check

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SUMMARY THOUGHTS

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- There is no such thing as objectivity in casework, only managed subjectivity!

- Experienced professionals see across the data:

  – pattern recognition - building up a bank of knowledge through comparing past and present cases

  – Knowing in action and theories in use (Schon, 1987) guide day to day practice and decision-making

  – Naming and framing – problem analysis provides a framework for understanding problems without being constrained by specific theories or academic knowledge

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REVIEW

Did you get the following from this workshop?

- A **conceptual framework** to guide practice and respond to and *process* (problem) situations
- A **problem solving framework** grounded in data based decision making, reason, and pragmatism
- A **framework to complement** your existing tools, processes, and case management kit (de Jong, 2006)
- A framework and perspective that is **focused on reducing the complexity** of a situation to create a way forward

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Intended learning outcomes

Did you get the following from this workshop?

- A **practical** perspective
- A perspective grounded in ~~best~~ **effective** practice
- Opportunity to **share** and contribute your knowledge and expertise

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